

**FRESNO, CALIFORNIA  
CLASS SPECIFICATION**

**PRINCIPAL BUDGET ANALYST**

**FLSA STATUS:**

Exempt

**CLASS SUMMARY:**

The Principal Budget Analyst is the third level in a three level Budget Analyst series. Incumbents are responsible for supervising staff and budget analyses and administration activities, including City-wide special projects associated with the City's budget. Incumbents are also responsible for preparing and presenting budgets to City management, representing the division on or chairing City-wide committees and task forces, and training City staff on processes and procedures associated with budget preparation processes. Incumbents may also be responsible for City-wide budgetary systems.

The Principle Budget Analyst is distinguished from the Senior Budget Analyst by its first-line supervisory responsibilities.

**TYPICAL CLASS ESSENTIAL DUTIES:** (These duties are a representative sample; position assignments may vary.)

**FRE-  
QUENCY**

- |    |   |              |
|----|---|--------------|
| 1. | Supervises staff to include prioritizing and assigning work; coaching; conducting performance evaluations; ensuring staff are trained; ensuring that employees follow policies and procedures; maintaining a healthy and safe working environment; and, making hiring, termination, and disciplinary recommendations.   | Daily<br>10% |
| 2. | Supervises the daily operation in assigned administrative support area, which includes: planning, coordinating, administering, and evaluating projects, processes, procedures, systems, and standards; developing and coordinating work plans, participating in the development of goals and objectives; and, ensuring compliance with applicable Federal, State, and Local laws, regulations, codes, and/or standards. | Daily 25%    |
| 3. | Performs ongoing budget administration and monitoring of assigned departments, including advising staff with assigned departments.  | Daily<br>25% |
| 4. | Administers the automated budget reporting and analysis system.   | Daily<br>15% |
| 5. | Participates in researching, analyzing, and preparing reports and presentations utilized by City management in determining City-wide position and funding levels in the annual budget.  | Daily<br>10% |

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<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties are a representative sample; position assignments may vary.)		<b>FRE- QUENCY</b>
6.	Researches, analyzes, makes recommendations and prepares amendments to Annual Appropriations Resolution, appropriation transfers, position requests, and/or other related items, from assigned departments, including identifying and verifying revenue and expenditure sources, and developing formal documentation for presentation to the City Council outlining proposed fiscal adjustments and associated impacts.	Annually 10%
7.	Develops, analyzes, and implements recommendations and changes to the City-wide budget preparation process.	Annually 10%
8.	Reviews, researches, analyzes, and prepares annual budget for one or more assigned departments or budget units for inclusion in the City's final budget; coordinates budget preparation processes with staff in assigned departments and budget units; develops recommendations based on findings.	Annually 50%
9.	Coordinates and participates in communicating budget policies and procedures, utilizing a variety of mediums, to the division and City staff and management.	Annually 5%
10.	Serves as a liaison and represents the City and/or the division in committees, task forces, and/or meetings to facilitate the development, scheduling, implementation, and monitoring of programs and projects that have City-wide budgetary impacts or require coordination between several departments.	Annually 5%
11.	Reviews existing and proposed legislation for the impact on the City and consults with affected departments, making recommendations as appropriate.	Annually 5%
12.	Performs other duties of a similar nature or level.	As Required

**Training and Experience** (positions in this class typically require):

- Bachelor's Degree in a related field and four years of experience at the Senior Analyst level or four years experience directly related to budget development and administration are required;
- OR
- An equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

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#### **Licensing Requirements** (positions in this class typically require):

Some positions, based on assignment, may require:

- Basic Class C License

#### **Knowledge** (position requirements at entry):

Knowledge of:

- Supervisory principles and practices;
- Public sector organizations, personnel and labor related policies and related structures;
- Accounting principles, practices and methods;
- Budget preparation and control techniques, principles and practices;
- Methods, materials, techniques and equipment utilized in assigned area of responsibility;
- Interrelationships between Federal, State and Local governments, public interest groups and private enterprises;
- Financial management principles and practices.

#### **Skills** (position requirements at entry):

Skill in:

- Monitoring and evaluating the work of subordinate staff
- Prioritizing and assigning work; detail oriented and ability to multi-task
- Training employees in proper work methods
- Using computers and applicable software applications
- Analyzing, processing and reconciling financial documents and information
- Organizing and presenting complex budgeting concepts to a large audience
- Developing and administering budgets
- Compiling and analyzing data and information
- Analyzing and making recommendations for improved methods and procedures
- Prepare and proofread clear, concise, and comprehensive reports, records, and other written documents
- Ability to prepare and make effective oral presentations
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, business, organizations, elected and appointed officials, media, etc. sufficient to exchange or convey information, give/receive work direction

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**Physical Requirements:**

Positions in this class typically require: feeling, finger dexterity, grasping, hearing, and repetitive motions, seeing and talking.

**Sedentary Work:** Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects including one's own body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met. Some positions may require more frequent walking, lifting and standing.

**Note:**

The above job specification is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.

**Classification History:**

Draft prepared by Fox Lawson & Associates (LM)

Date: 12/2007

Reviewed by the City of Fresno

Date: 5/2008